

## Publication 1436 Change Page for 1040/4868 MeF scenarios

The Publication 1436 combines the current e-File system test scenarios and the Modernized e-File (MeF) test scenarios. The changes below for scenarios 1, 2 and 3 apply to both the current e-File system and MeF. Test Scenario 5 changes apply to the MeF scenario only.

### 01/31/2010 Revision

Item #	Test Scenario #	Publication 1436 Page #	Change	Date Changed
1	1	55	Form 1099-R - change recipient's zip code to 94102	10/29/2009
2	1	52	Add Other Withholding Statement:  WITHHOLDING CODE      WITHHOLDING AMOUNT FORM 1099                      20000	1/31/2010
3	2	63	Preparer's City changed to Buffalo	10/29/2009
4	3	71	Preparer's City changed to Buffalo	10/29/2009
5	3	72	Form W-2 Box 3 - changed to 106,800	10/29/2009
6	3	73	Schedule A - Line 10 changed to 3200 Line 13 changed to blank or zero	10/29/2009
7	3	74	SELLER FINANCED INTEREST      700 300 SCH B TEST ADDRESS NY, NY 10007 400-00-1111 700 INTEREST PAYER 1                      1300 (changed from 300) INTEREST PAYER 2                      1000 NOMINEE PAYER 1                      500 NOMINEE PAYER 2                      500 INTEREST SUBTOTAL                      4000 NOMINEE DISTRIBUTION                      1000	10/29/2009
8	3	76	Form 2106 Part II Line 11 - change date to 02/17/2009	10/29/2009
9	5	various	Change City to Grubville for all addresses with Zip code 63041	10/29/2009
10	5	n/a	Form 1099-R missing in scenario - it is attached to this file	10/29/2009
11	5	96	Schedule A Line 29 - "No" box should be checked	10/29/2009
12	5	97	Sch C - Stan Blue - Part I change to Line 1    530000 Line 2    10000 Line 3    520000 Line 4    30000 Line 5    490000	10/29/2009
13	5	110	Form 4562 - Line 20c(c) changed from 100,000 to 104,350	11/6/2009
14	5	88	Award amount changed to 1150	11/6/2009
15	5	91	Form W-2 (Sandy Blue) Line 17 changed to 500 & 200 Line 19 changed to 500 & 600	11/6/2009
16	5	96	Schedule A Line 5 changed to 3000 Line 6 changed to 1500 Line 9 changed to 4500 Line 10 changed to 1500 Line 15 changed to 1500	11/6/2009

17	5	93	Line 33 should be blank in the Publication (73 is not correct)	11/20/2009
18	5	105 & 106	Form 2441 Line 1 and Line 18: change to 3300	11/20/2009

Note: In 1040 MeF test scenario 5, TP elects to apply withholding to quarters actually worked

☐ CORRECTED (if checked)

PAYER'S name, street address, city, state, and ZIP code <b>XYZ Company</b> <b>15 Oak Street</b> <b>Sacramento, CA 94203</b>		<b>1</b> Gross distribution \$ 20000		OMB No. 1545-0119 <b>2009</b> Form <b>1099-R</b>		<b>Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.</b>	
		<b>2a</b> Taxable amount \$					
		<b>2b</b> Taxable amount not determined <input type="checkbox"/>		Total distribution <input type="checkbox"/>			
PAYER'S federal identification number <b>69-0000010</b>		RECIPIENT'S identification number <b>400-00-1035</b>		<b>3</b> Capital gain (included in box 2a) \$		<b>4</b> Federal income tax withheld \$	<b>Copy B</b> <b>Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.</b>  This information is being furnished to the Internal Revenue Service.
RECIPIENT'S name  <b>STAN BLUE</b>  Street address (including apt. no.)  <b>4000 5th Test St Apt 6</b>  City, state, and ZIP code <b>Grubville, MO 63041</b>		<b>5</b> Employee contributions /Designated Roth contributions or insurance premiums \$		<b>6</b> Net unrealized appreciation in employer's securities \$			
		<b>7</b> Distribution code(s) <b>1</b>		<input type="checkbox"/> IRA/SEP/SIMPLE	<b>8</b> Other \$ %		
		<b>9a</b> Your percentage of total distribution <b>80 %</b>		<b>9b</b> Total employee contributions \$ <b>10000</b>			
		<b>10</b> State tax withheld \$ <b>500</b> \$ <b>300</b>		<b>11</b> State/Payer's state no. <b>MN 69-0000007</b> <b>KS 69-0000006</b>		<b>12</b> State distribution \$ <b>5000</b> \$ <b>5000</b>	
		<b>13</b> Local tax withheld \$ <b>250</b> \$ <b>150</b>		<b>14</b> Name of locality <b>Locality 1</b> <b>Locality 2</b>		<b>15</b> Local distribution \$ <b>5000</b> \$ <b>5000</b>	
Account number (see instructions) <b>123456</b>							

Form **1099-R**

Department of the Treasury - Internal Revenue Service

Note: Taxpayer did not receive a lump sum distribution

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07/31/2008